Chapter 2 - Probate Header - HDR

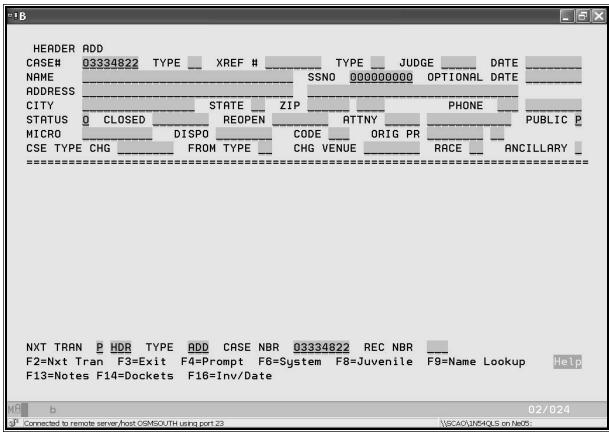
Probate Header Screen

The header screen is used to add information about the juvenile. Users must have security to be able to update case information.

Accessing the Header Screen:



From the Next Tran Line, enter HDR in the Next Tran field and the option that you want to perform (ADD, INQ, MOD, DEL) along with the case number. Press <Enter> and the system will display the header screen.



Following are the field descriptions for the Case Screen.

~Case #~

This area displays the case number . Listed next to the case number will be the suffix number. Suffix numbers are used when there are multiple children in one case.

~Type~

Enter the case type for this case. Press <F4> for a list of case types.

~XRef~

Enter the cross referenced case number in this field.

~Type~

Enter the type of the cross referenced case. Press <F4> for a list of valid case types.

~Judge~

Enter the judge that is handling this case. Press <F4> for a list of valid jurists. Once a jurist has been entered into this field, the name will display below the field.

~Date~

Enter the date the case was filed with the court.

~Name~

Enter the name of the individual or deceased person that this case is for.

~SSNO~

Enter the social security number if known.

~Optional Date~

This date is used for two purposes:

- 1. Minor Guardianships Enter the minors date of birth. The minor guardianship review list will NOT pick this case up if the date of birth is not entered in this field.
- 2. Deceased estates Enter the decedents date of death.

~Address, City, State and Zip~

Enter the address of the individual.

~Phone~

Enter the telephone number for the individual.

~Status~

This field is used to determine the status of the case. The following should be used.

- 1. Enter "O" when the case is opened.
- 2. Enter "C" when the case is closed.
- 3. Enter "A" when the case is administratively closed.
- 4. Enter "O" when the case is re-opened.

~Closed~

Enter the date the case was closed. If the case has been reopened, enter the most recent closed date. The status field must be changed to "C" when a case is closed. All parties must be discharged before the system will allow the case to be closed.

~Reopen~

Enter the date the case was reopened. The status field must be "O" when a case is reopened.

~Attorney~

Enter the bar number of the attorney that represents the individual or minor. Press <F4> for a list.

~Public~

Enter the public status for this case. Press <F4> for a list of statuses.

~Micro~

Enter the microfilm number for this case.

~Dispo~

Enter the date that this case was disposed.

~Code~

Enter the disposition code for this case.

~Original PR~

This field will display the original PR date and party number. The field will only be populated for DE/DA case types.

~Case Type Change~

Enter the date that this case type was changed.

~From Type~

Enter the previous case type for this case.

~Chg Venue~

Enter the date that you received this case from another county.

~Race~

Enter the race of the individual or minor in this field.

~Ancillary~

Enter an "X" if this case is an ancillary case to the circuit court.

Adding or Modifying a Case

From the Next Tran Line, enter the following:

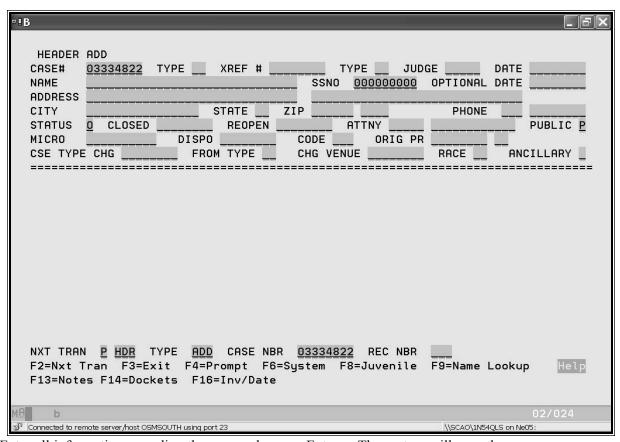
Adding:



Modifying:



When all information has been added, press <Enter> and the system will display the screen you requested.



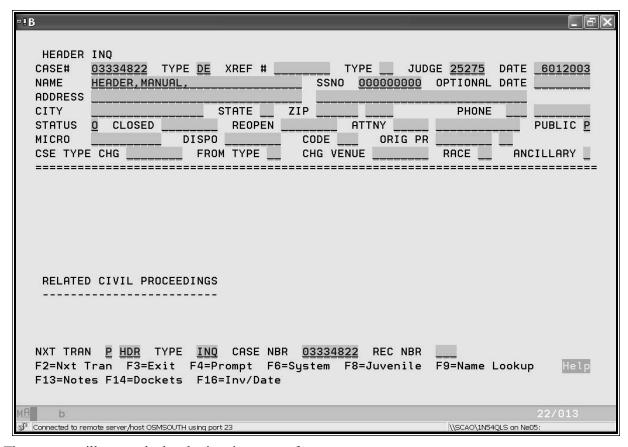
Enter all information regarding the case and press <Enter>. The system will save the case.

Inquiring on a Case

From the Next Tran Line enter the following information:

```
NXT TRAN <u>P HDR</u> TYPE <u>INO</u> CASE NBR <u>20035555</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will display the screen you requested.



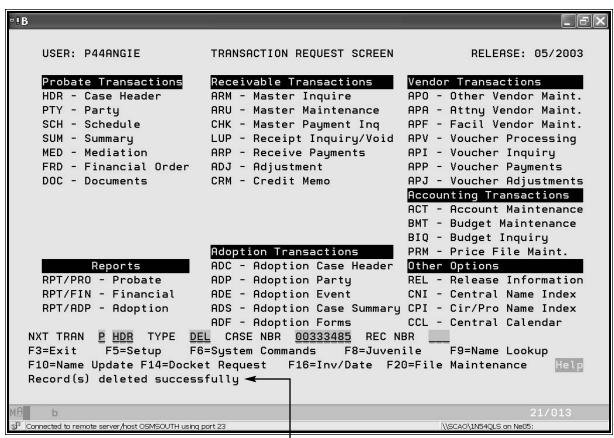
The system will return the header inquiry screen for you.

Deleting a Case

From the Next Tran Line enter the following information:

```
NXT TRAN <u>P HDR</u> TYPE <u>DEL</u> CASE NBR <u>20035555</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will delete the requested header.



The system will automatically delete the records.

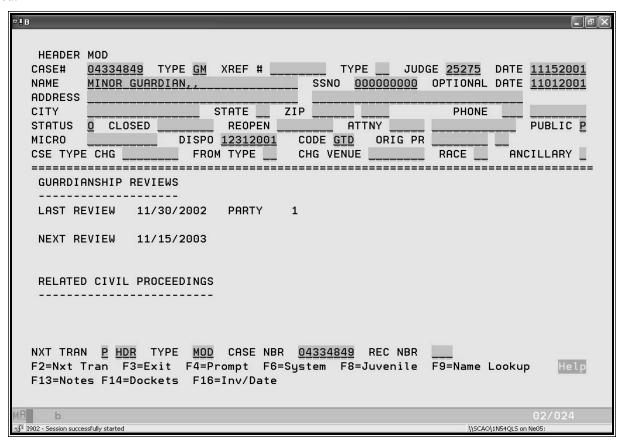
Re-Opening a Case

To Re-open a case, modify the header screen and enter the date the case reopened in the reopen field along with an "O" in the status field. Following is an example of this.

From the Next Tran Line, enter the following information.

```
NXT TRAN <u>P HDR</u> TYPE <u>MOD</u> CASE NBR <u>20035555</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will display the screen you requested.



Change the status of the case to "O - Open" and enter the date the case reopened in the "Reopen" field and press <Enter>. The system will reopen the case. The system will generate an event of "RPN - Case Reopened".

The following rules apply when re-opening a case.

- 1. A case can't be re-opened if it is open. The case must be closed first.
- 2. A case can't be opened after it is closed, it must be re-opened.
- 3. The re-open date must be greater than the file date and less than or equal to today's date.

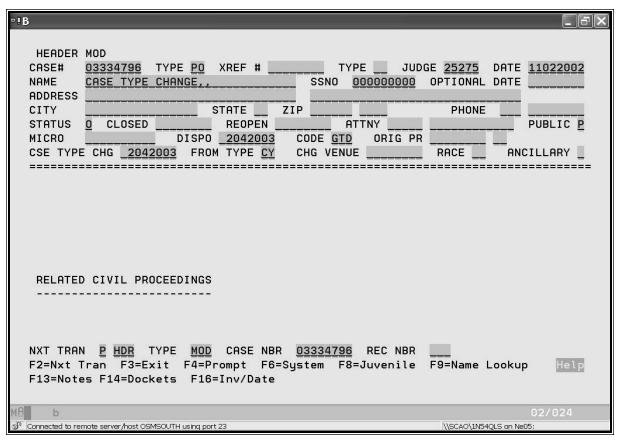
Changing the Case Type

To change a case type, enter the following information.

From the Next Tran Line, enter the following information.

```
NXT TRAN <u>P HDR</u> TYPE <u>MOD</u> CASE NBR <u>03334796</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will display the screen you requested.



- 1. Enter the new case type in the type field.
- 2. Enter the date the case type changed in the "Cse Type Chg" field.
- 3. Enter the previous case type in the "From Type" field.
- 4. Press <Enter>.

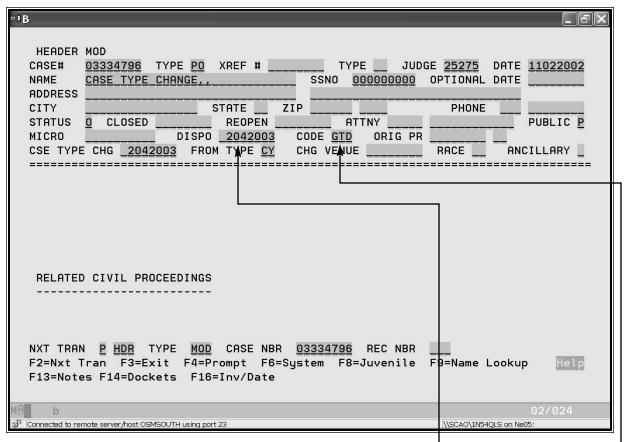
The system will create an event of "TPC - Type changed" and add it to the schedule screen. Please note that this will count on the caseload report. If this case type change should not be counted on caseload, simply change the case type in the "Type" field and press <Enter>. The type will be changed only.

Disposing a Case

From the Next Tran Line, enter the following information.

```
NXT TRAN <u>P HDR</u> TYPE <u>MOD</u> CASE NBR <u>03334796</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will display the screen you request-



- 1. Enter the date the case was disposed in the disposition field. —
- 2. Enter the code for this disposition in the code field. Prompt <F4> for a list of disposition codes.
- 3. Press <Enter>.

The system will create an event of "DSP" and add it to the schedule screen. Please note that this will count on the caseload report.

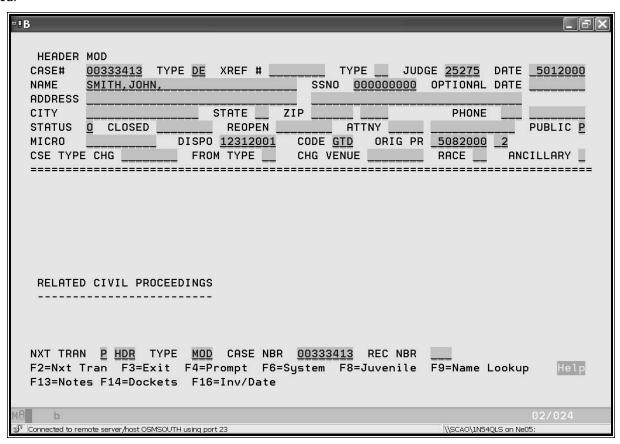
NOTE: All cases except MI and JA are disposed of on the Header screen. MI and JA cases are disposed of on the schedule screen. These will be explained further in the Schedule Screen chapter.

Original Personal Representative and Party Number

From the Next Tran Line, enter the following information.

```
NXT TRAN <u>P HDR</u> TYPE <u>MOD</u> CASE NBR <u>03334796</u> REC NBR ___
```

When all information has been added, press <Enter> and the system will display the screen you request-



The system will evaluate the parties for the case and determine which PR is the original. That date will be inserted into this field with the party number that is associated with it.

NOTE: DE and DA case types along with all party types except NPR -No Personal Representative and IRN - Intent to Receive Notice.